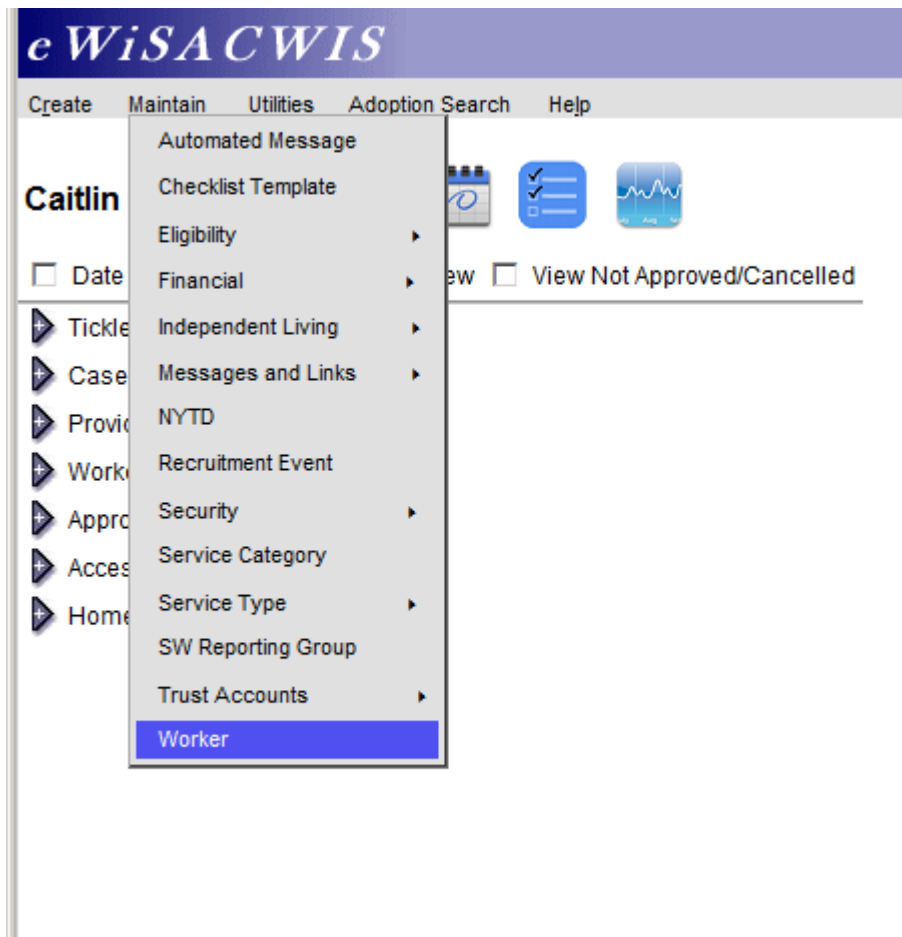# Maintain Worker Record

The Maintain Worker page is used to update information about an existing worker, add a new worker, and create security requests for that worker. The page can be used to update a worker's job class, location, supervisor, and person management information. If a worker moves from one county to another, update the existing worker record by following these steps. Do not create duplicate worker records.

1. Click on Maintain > Worker. This will open the Maintain Worker Information page.

2. Click on the Search hyperlink to search out the existing worker you wish to update information about, or to search for a new worker being added.

> **Note:** Workers will only see the Basic tab on the Maintain Worker Information page. Supervisors and Security Delegates will see the Worker Security tab as well.

3. Type the name of the worker and click the Search button. If the correct worker is found select the radio button next to the worker. If the worker is not returned, click the Create button to create a new person that is not already known to eWiSACWIS. See the Person Management Quick Reference Guide for assistance creating the new record. Once the proper worker is selected or created, click Continue.

4. The Basic tab of the Maintain Worker Information page will pre-fill with information regarding the worker. The worker name is a hyperlink and will open the worker's Person Management record where their name and other basic demographic information can be updated. On the Maintain Worker Information page you will find:

- **Current Position Information** group box contains Start and End Date, Status, Independent Living Coordinator, Medicaid Rep (this allows a worker to approve and send MA requests to the State), and the Supervisor Name. To add or change the worker's supervisor, click the Search hyperlink.
- **Worker Type** group box displays if the worker is County, State, or Vendor.
- **Contact Information** group box displays the Phone, Ext., Cell, Fax, and Email.
- **Location** group box is used to document the Employing Entity, County/State, Site/Office, and Unit.
- **Worker Role** group box is where you enter information about the worker's primary (more than 50%) job function. This is used to determine if this worker is subjected to Wisconsin Administrative Code DCF 43. To insert a new row in the Worker Role group box, click the Insert button. If there was a previous row already existing, you must enter an End Date before the Insert button will be enabled and a new row can be inserted. If the Worker Role is either Case Worker or Supervisor and the Primary Function is CPS, the 'DCF 43 Required' checkbox will automatically be checked, and this worker will appear in the CM1801 – DCF 43 Worker Training Report.
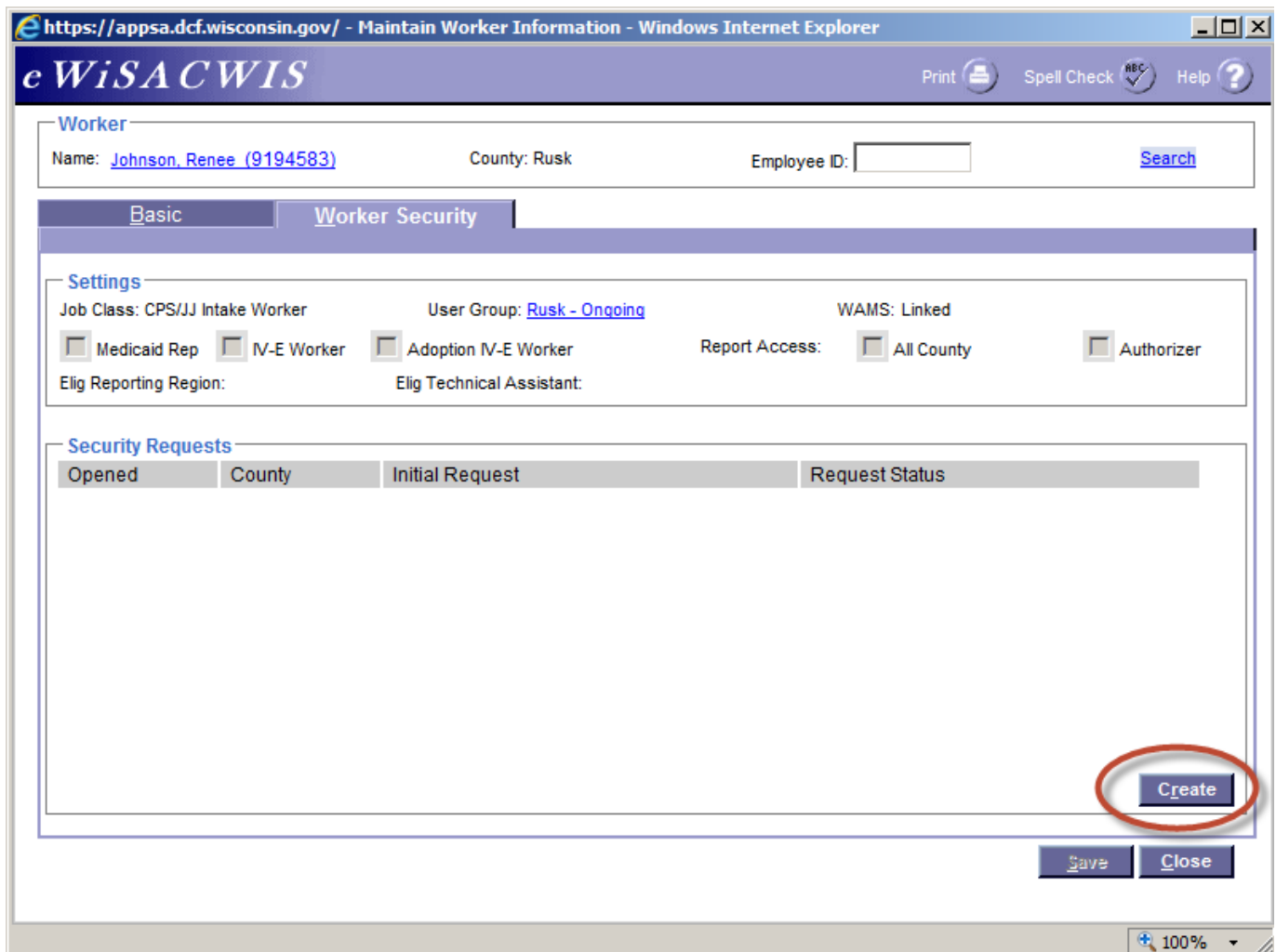
5. If the worker is a new worker, the following message will appear upon saving the page. Clicking "yes" to this message will create a security request to your Security Delegate. Clicking "No" to this message, will not allow you to "activate" a new worker and save. Go to the Worker Security tab to access the security request.
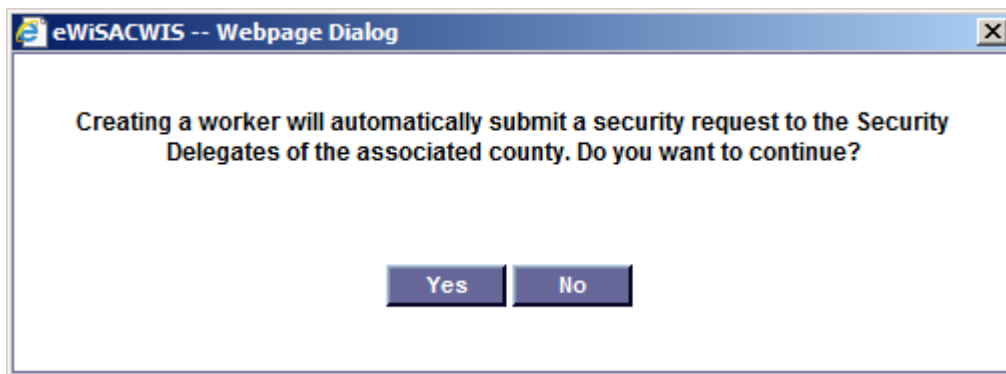
6. The Worker Security tab displays details related to the worker's security. To modify this worker's security, click Create to create a new security request.

7. If the worker is not a new worker to eWiSACWIS, the Security Request page will default to a Change Request Type. Select Delete if you want Delete the worker.

8. The column on the left is the Requested Changes that you'd like the worker's security to become. The center column, Current Settings, is the current security the worker has. Anything highlighted in yellow are the differences between the two columns. If you'd like to make a worker's security exactly like another worker's, select the Search hyperlink under the Compared Worker column.

9. Selecting the Search hyperlink under the Compared Worker column brings you to the Worker Security Search page. The County will default to your county. In the below example a search is being done with all active worker's from Rusk County. Select the radio button next to the name of the worker whose security you want to copy and click "continue".   (Or, if you know a worker's name with exact security you want, you can just type in their First name, Last name and search out that worker and click the radio button to insert their security.)

10. The yellow fields in the Current Settings and Compared Worker columns are the differences of what is currently being requested in the Requested Settings column. If Match is selected from the Compared Worker column, all of the Requested Settings will automatically update with the security of the worker you searched out.

11. Saving the page with any changes will insert a row in the Processing group box. Here you can find an ongoing record of both saved changes and any narrative that has been entered. Narrative can be entered at any time prior to approval, and can be used for communication between the supervisor, security delegate, and state security liaison.

> **Note**: A supervisor will only be able to enter text on the Security Request page.

12. A Compare user groups hyperlink will appear in the lower left corner of the page. Selecting it will open the User Group Comparison page.

13. The Group 1 column shows the profiles of the requested user group of the worker. The Group 2 column shows the profiles of the worker's current user group. Select the Only show differences checkbox to remove all profiles that are the same between the two user groups.

14. To approve or cancel the security request, there are 4 different options:

- **The request is not complete**: if this checkbox is checked (which it is by default), when the security delegate approves the page, the request will be sent to the State Liaison. If the checkbox is unchecked, the system will determine if the approval needs to be sent to the State Liaison.
- **Approve:** When selected with Go, the system will determine if there are any requested security changes that require a State Liaison approval. An example of this is choosing Yes to requesting a Security Delegate. If the requested security does not require a State Liaison's approval, your request will automatically be approved when you click Approve and Go at which time the page will freeze and any further changes will require you to create a new security request.
- **Cancel:** Choosing cancel effectively not approves the security request and it becomes froze but viewable for future reference.
- **Send to State Security Liaison**: Choosing this option will automatically send the security request to the State Liaison.

15. If you do not use the Options dropdown, but only want to make notes and "Save" you can make changes and click Save. This will save your changes but the request status remains the same such as "with delegate", with "state liaison" or "pending submission".

16. The Request Status column gives the current status of each security request.

> **Note**: A quick way for a Security Delegate to see all of their security requests is by going to the Security Request Search page via Maintain > Security > Security Requests.